



# Systems for Consistent Client Communication

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## Systems for Client Communication During Client Onboarding

- Know your client.
- Know what questions to ask.
- Communicate expectations clearly.

A close-up photograph of a person's hand pointing towards a screen. The person is wearing a white button-down shirt. The background is blurred, suggesting an office or meeting environment.

## The Intake Phase

“Two things remain irretrievable: time and a first impression” – Cynthia Ozick



# Transitioning to Litigation

Formalizing the attorney client relationship.

What is the role of the intake/client onboarding staff when transitioning a case to the litigation team?

- Streamline contract drafting.
- Explain the agreement.
- Transition to the litigation team.





# The Litigation Phase

Policies and Procedures to Ensure Consistency

# The Clients Role V. The Legal Assistants Role

Ensure **both** parties are on board.



## Client

- Provide documents.
- Provide case specific details.
- Keep representing firm update on any changes regarding contact information or details relative to the case.
- **Maintain confidentiality on the case.**



## Paralegal

- Collect and organize documents.
- Input and organize case specific details in database.
- Communicate and update client on case status.
- Maintain regular intervals of communication despite case phase.
- **Maintain confidentiality on the case.**

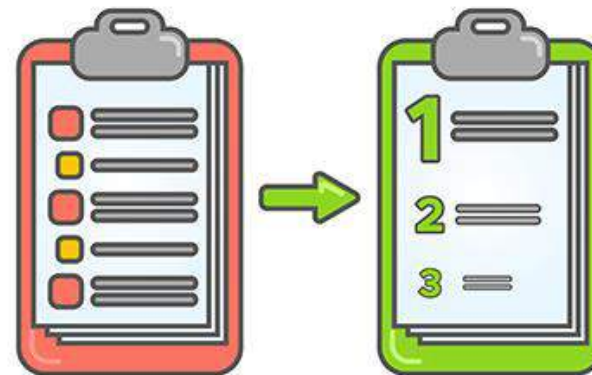
# UPL

How Implementing Consistent Systems Can Avoid This Entirely.



# Learning to Prioritize

What level of maintenance does your client need to succeed?



Prioritize





# Transitioning to Settlement

How do systems need to change to accommodate this new phase?



# Maintaining Consistency During The Settlement Phase

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The Offer

Distribution Sheets

Liens





# Thank You

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